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Desk Reviews

In the PIA System

Version: March 2024

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Contents

- Desk review alerts in PIA
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Desk Review Alerts in PIA

When information for a desk review is available, PIA will generate an alert to the AAA.

There are two types of desk review alerts.

- The first is a **priority** alert when the determination has changed from **NFCE to NFI or NFI to NFI.** (Please refer to the Desk Review Cheat Sheet on the Aging Well website before completing an NFI to NFI priority review).
  - The alert description will state *Priority Level of Care has changed*.
  - These must **ALWAYS** be given priority.

- The second alert is *Information for Desk Review is Available.*
  - This alert is triggered when an MCO completes an assessment.

- The next slide shows how to look for both types of alerts.

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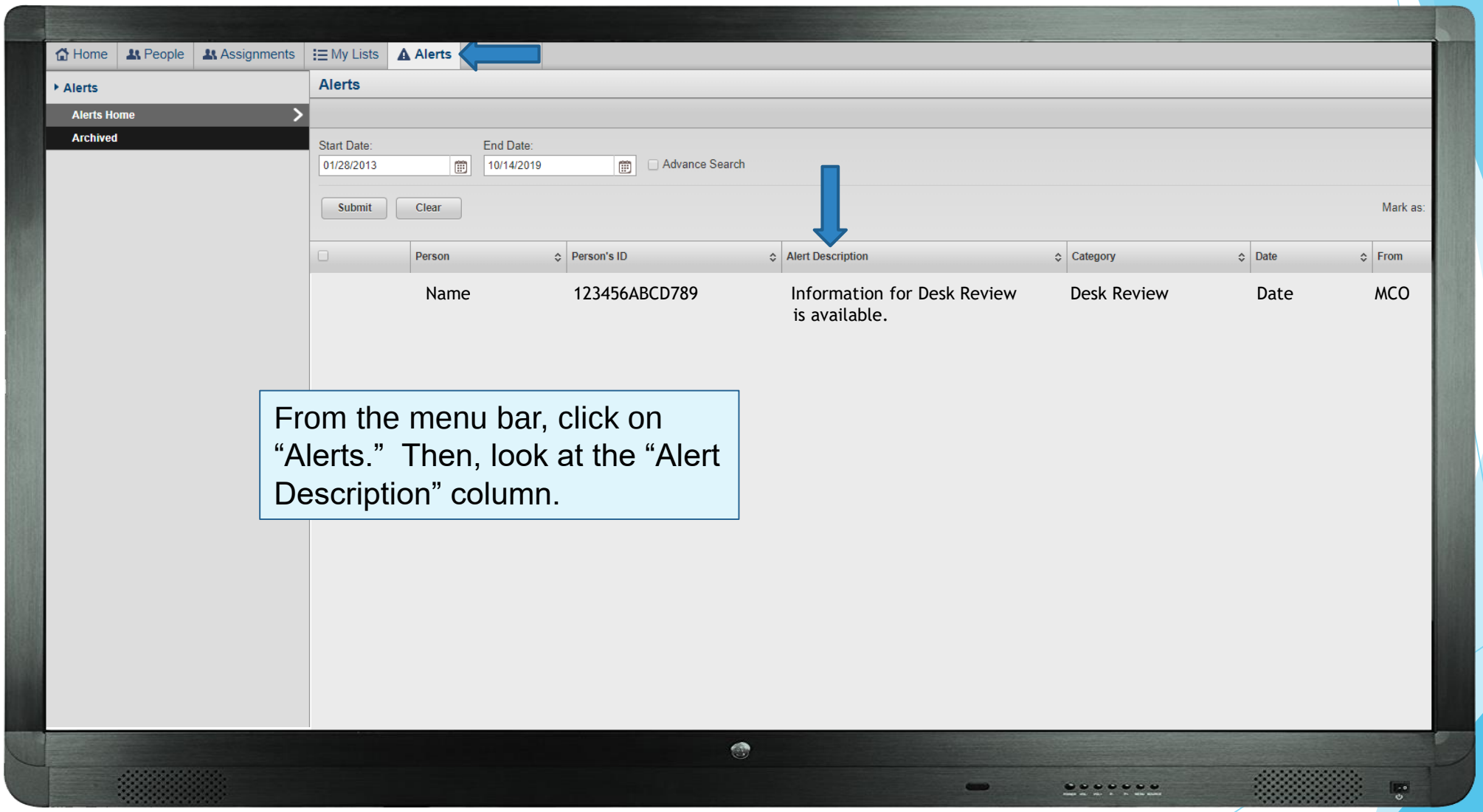
Locating desk review alerts in PIA



From the menu bar, click on "Alerts." Then, look at the "Alert Description" column.

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Exporting desk review alerts in PIA

If you receive multiple alerts, you have the option to download them into an Excel document. Exporting to Excel allows you to manipulate and save the data.

Aging Well created a quick reference guide for exporting alerts in PIA.

The “Desk Review Alert – Exporting to Excel –Quick Reference” document is available on the AWP Website.

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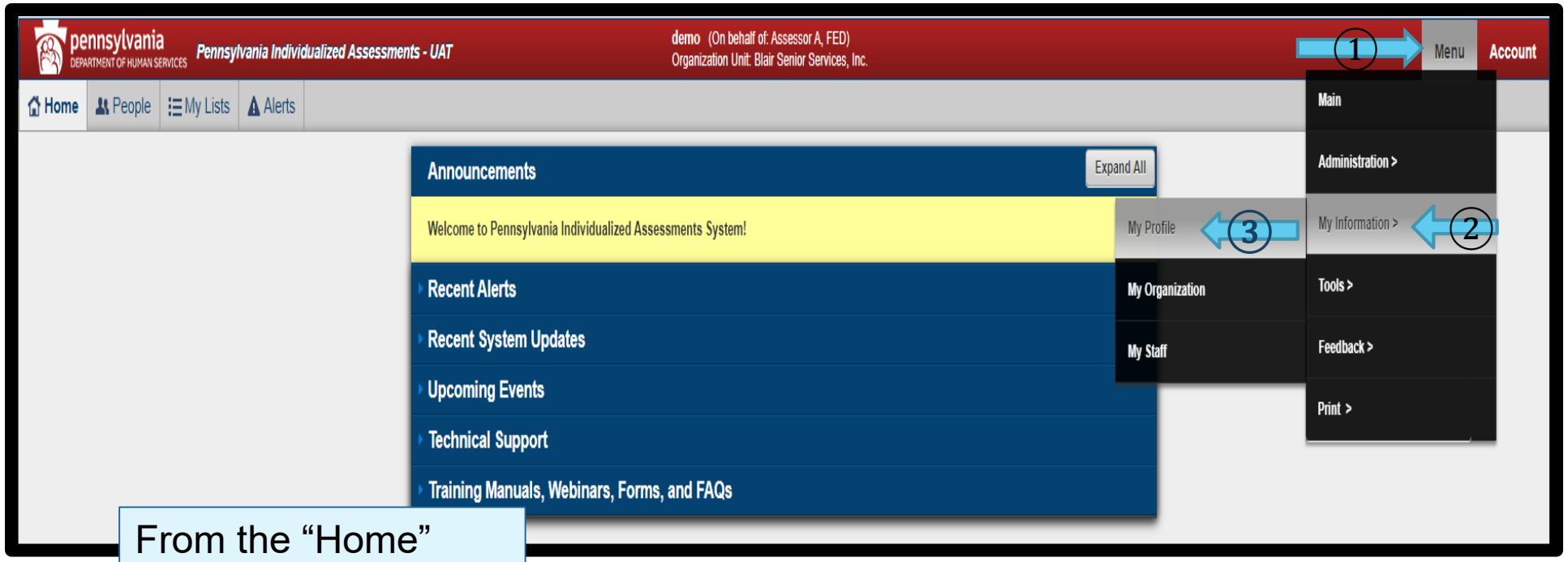
Email Alerts

In addition to the alerts in PIA, there is an option to have an email alert sent.



From the “Home” page, hover on “Menu” then “My Information,” & then click “My Profile”

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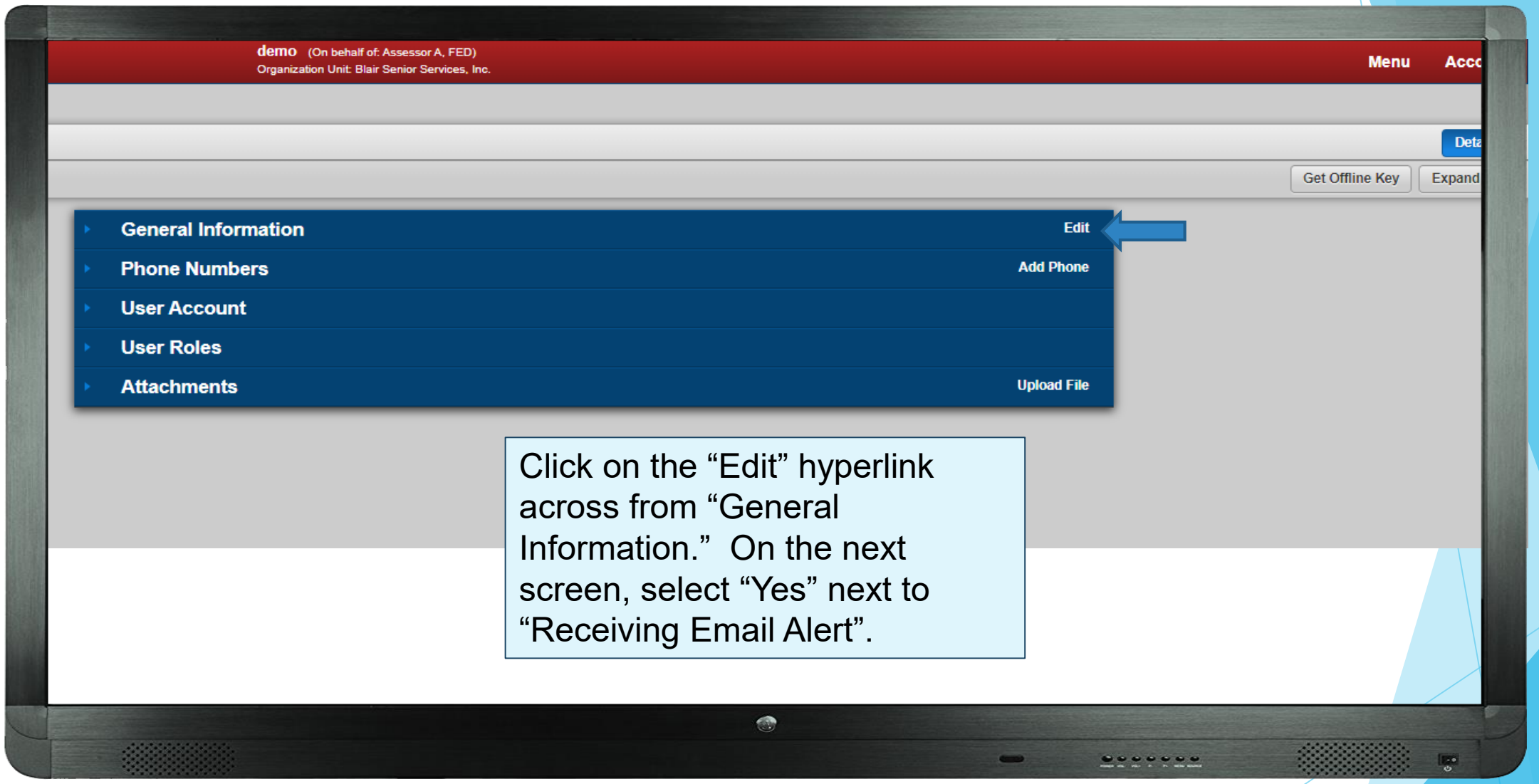

Click on the “Edit” hyperlink across from “General Information.” On the next screen, select “Yes” next to “Receiving Email Alert”.

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Assigning Desk Reviews

- When an alert arrives, it must be assigned to someone to complete it. This is done in the same way FEDs are assigned.

- Instructions for assigning individuals to staff and managing desk review alerts in PIA are located on the Aging Well website https://agingwellpa.org under:
  - AWP Resources for AAAs
    - PIA Resources > PIA Quick Reference Guides
      - Supervisor Quick Reference Guide
    - Resources for AAA's > Desk Review
      - Desk Review Alert Process
      - Desk Review Alert- Exporting to Excel Quick Reference

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How to Complete a Desk Review

- In order to do a desk review, you must have two sets of FED data open at the same time.

- The next series of slides will show you how to do this.

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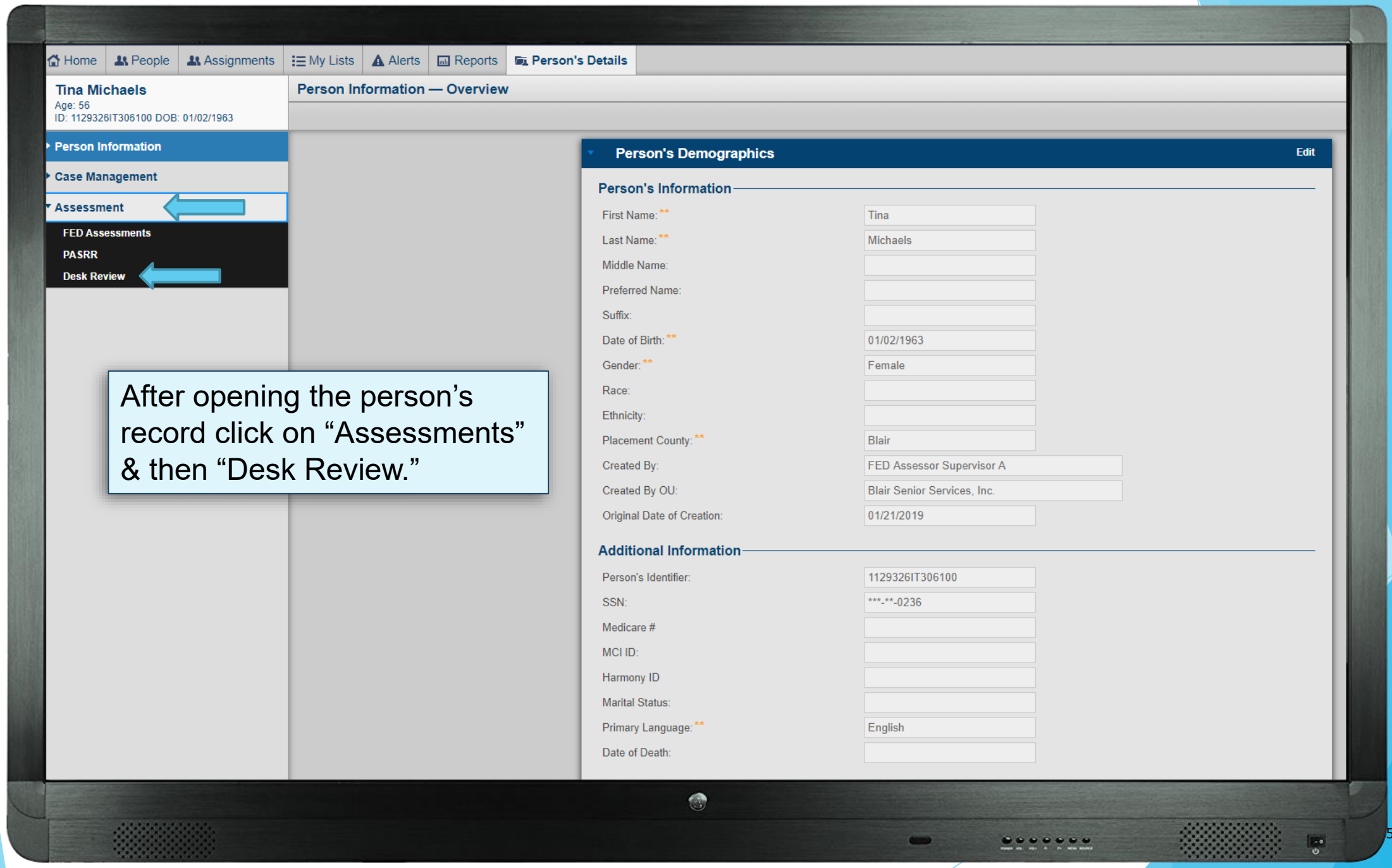

After opening the person's record click on "Assessments" & then "Desk Review."

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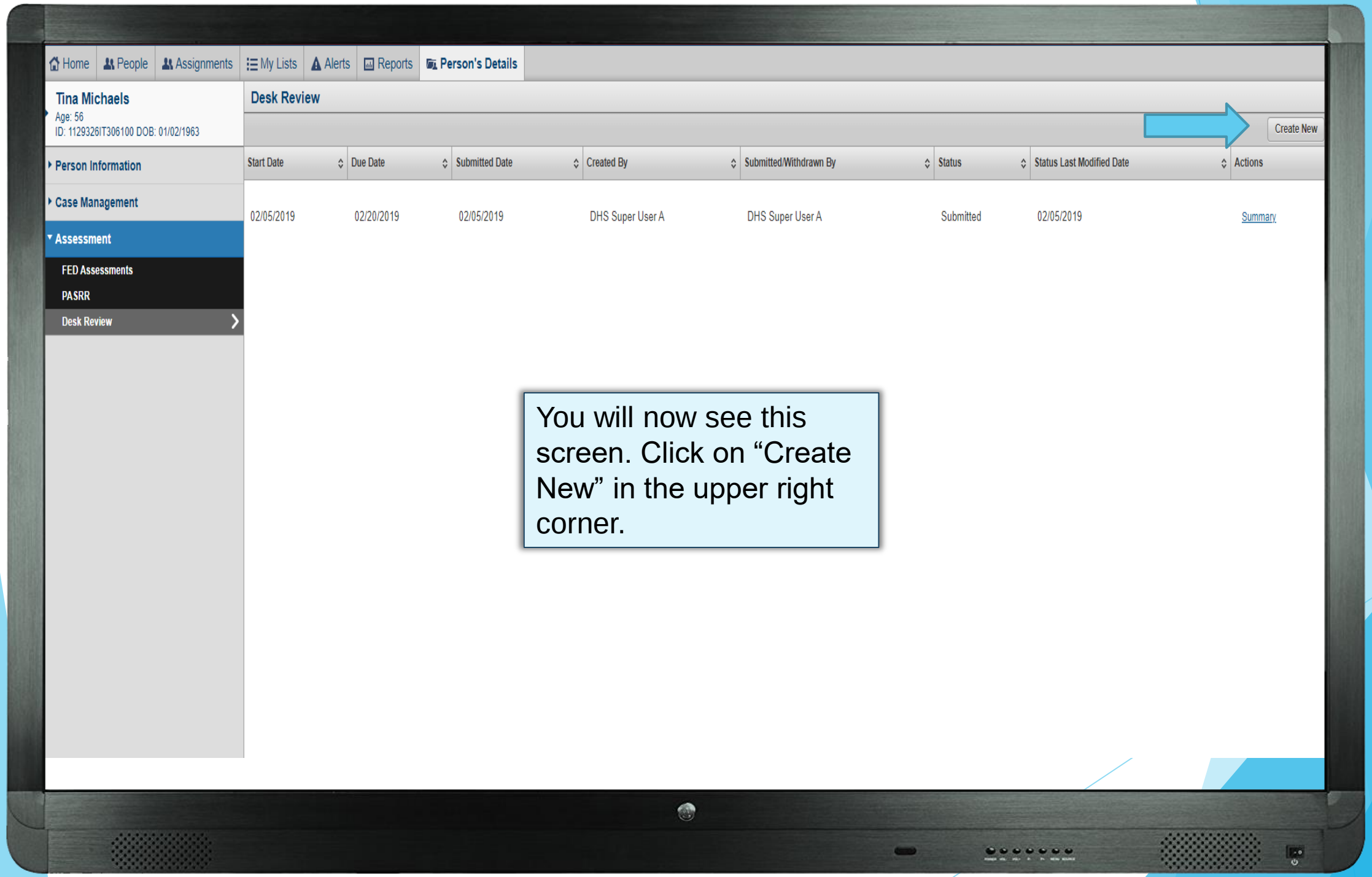

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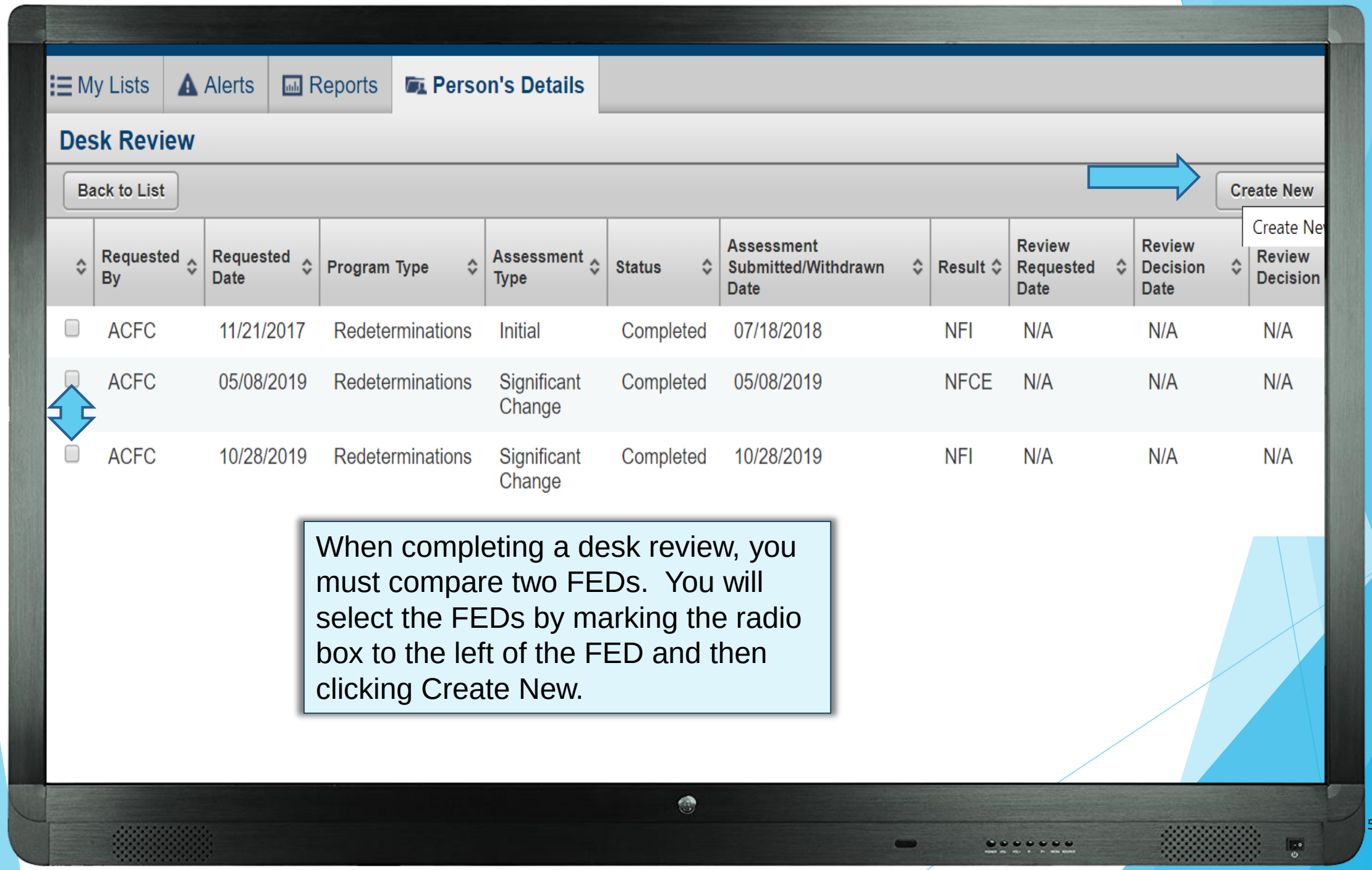

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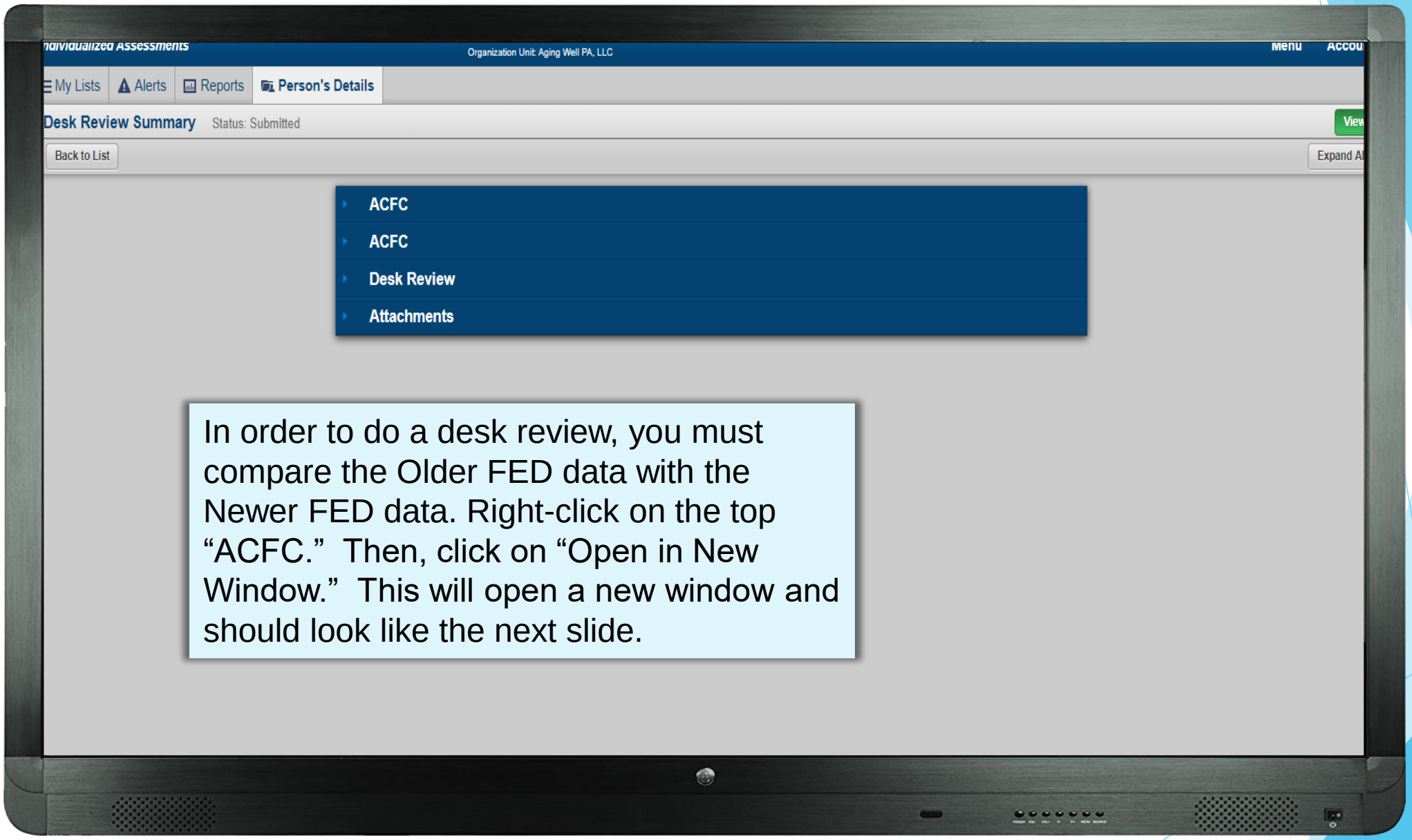

In order to do a desk review, you must compare the Older FED data with the Newer FED data. Right-click on the top "ACFC." Then, click on "Open in New Window." This will open a new window and should look like the next slide.

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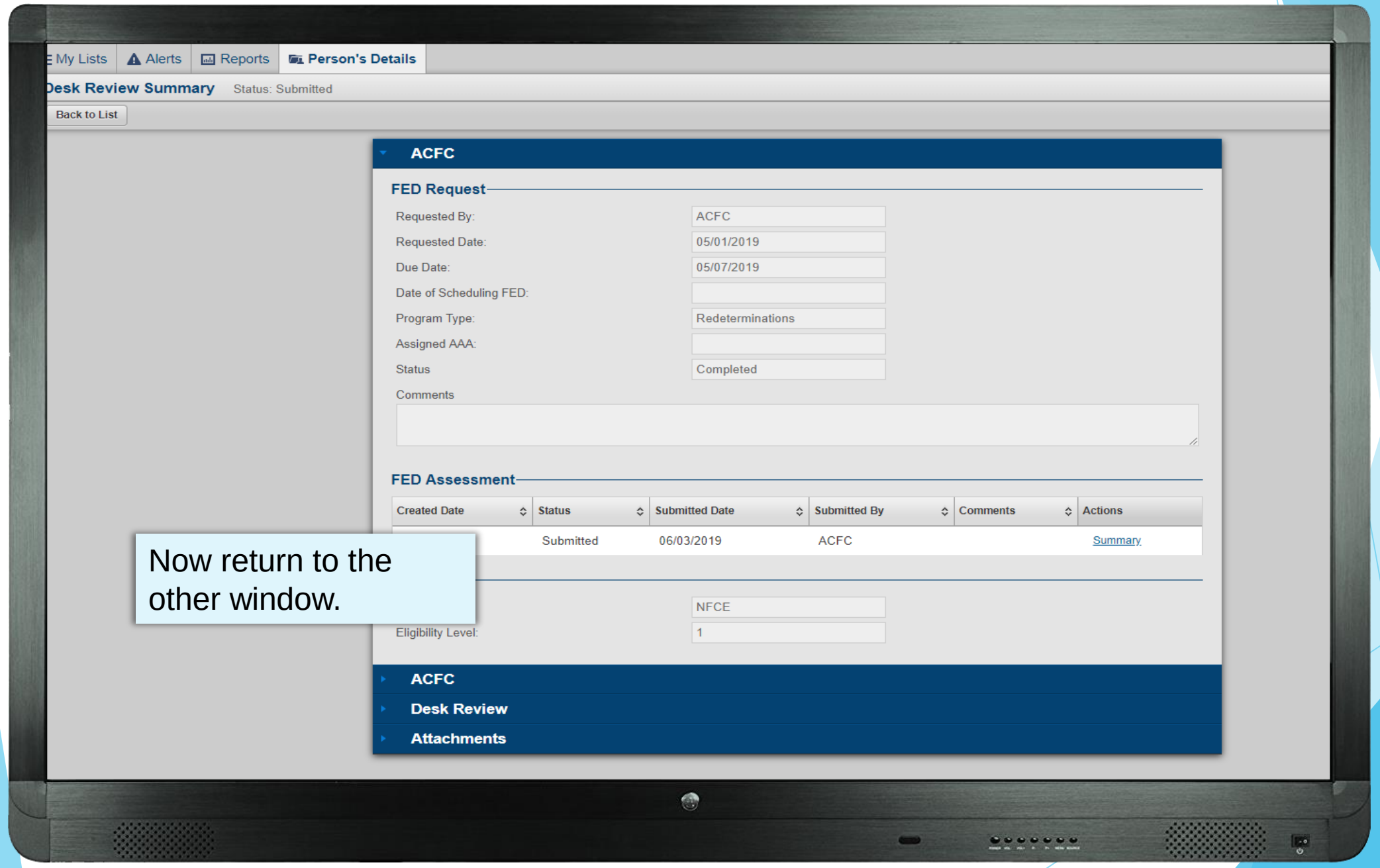

Now return to the other window.

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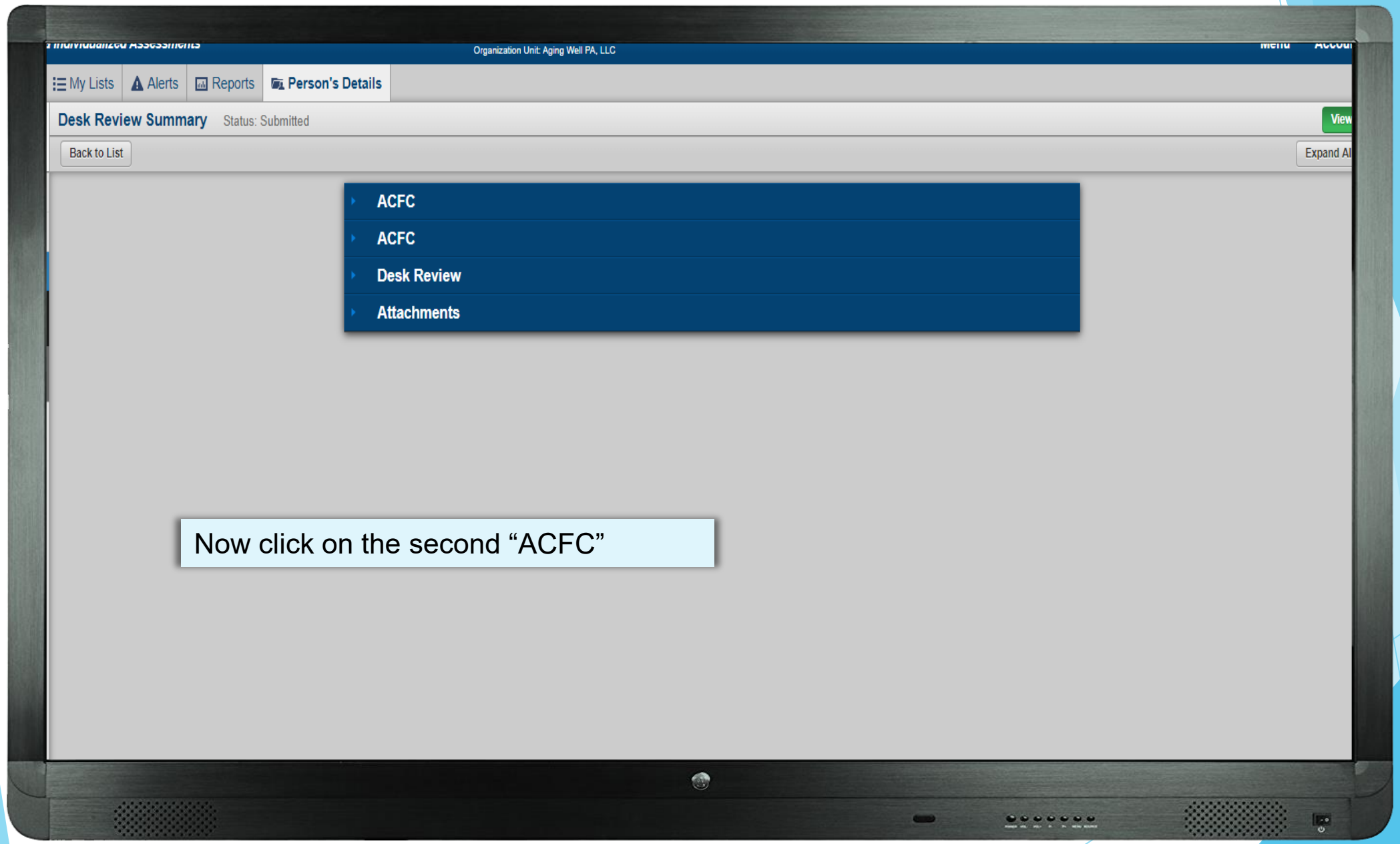

Now click on the second “ACFC”

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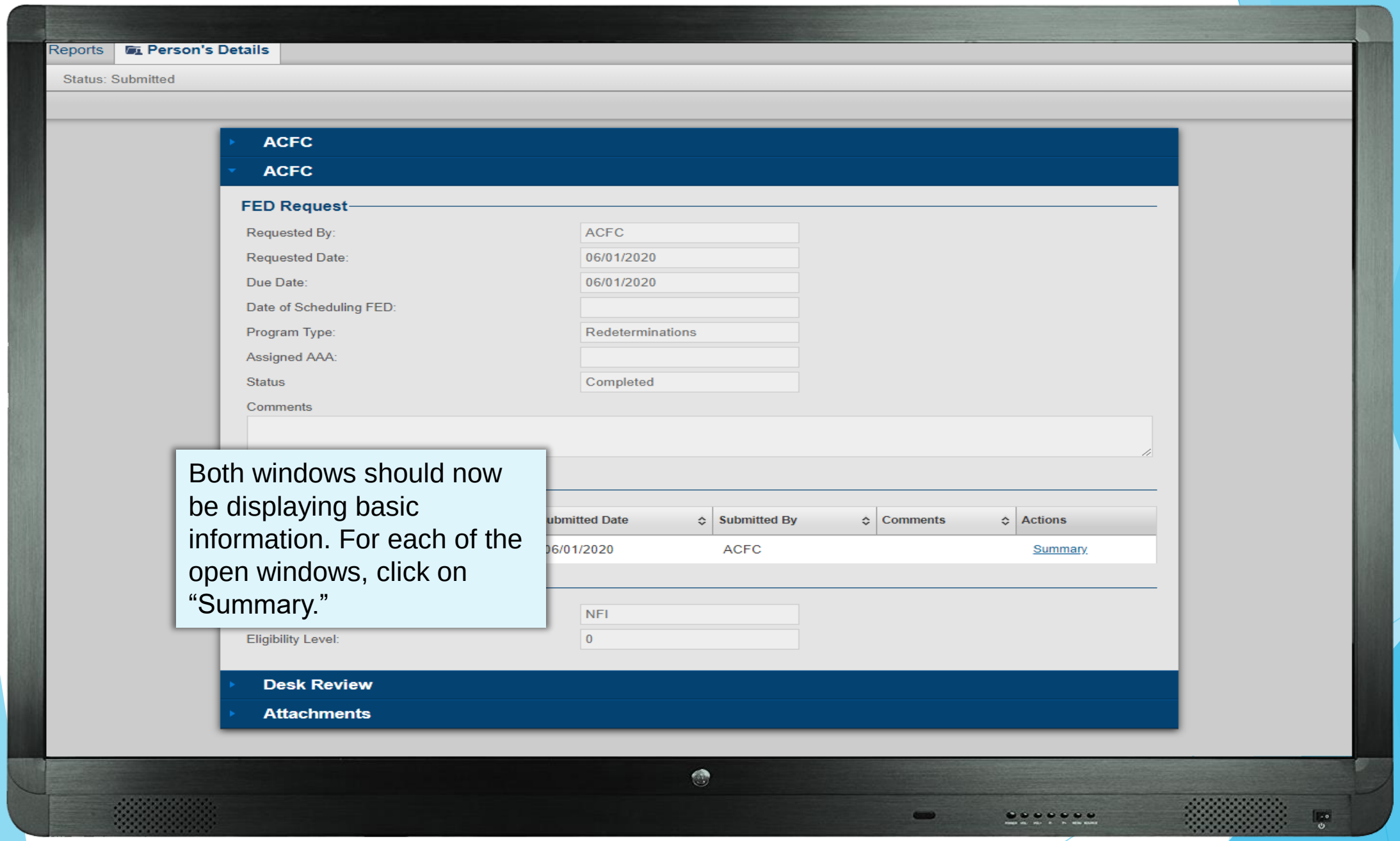

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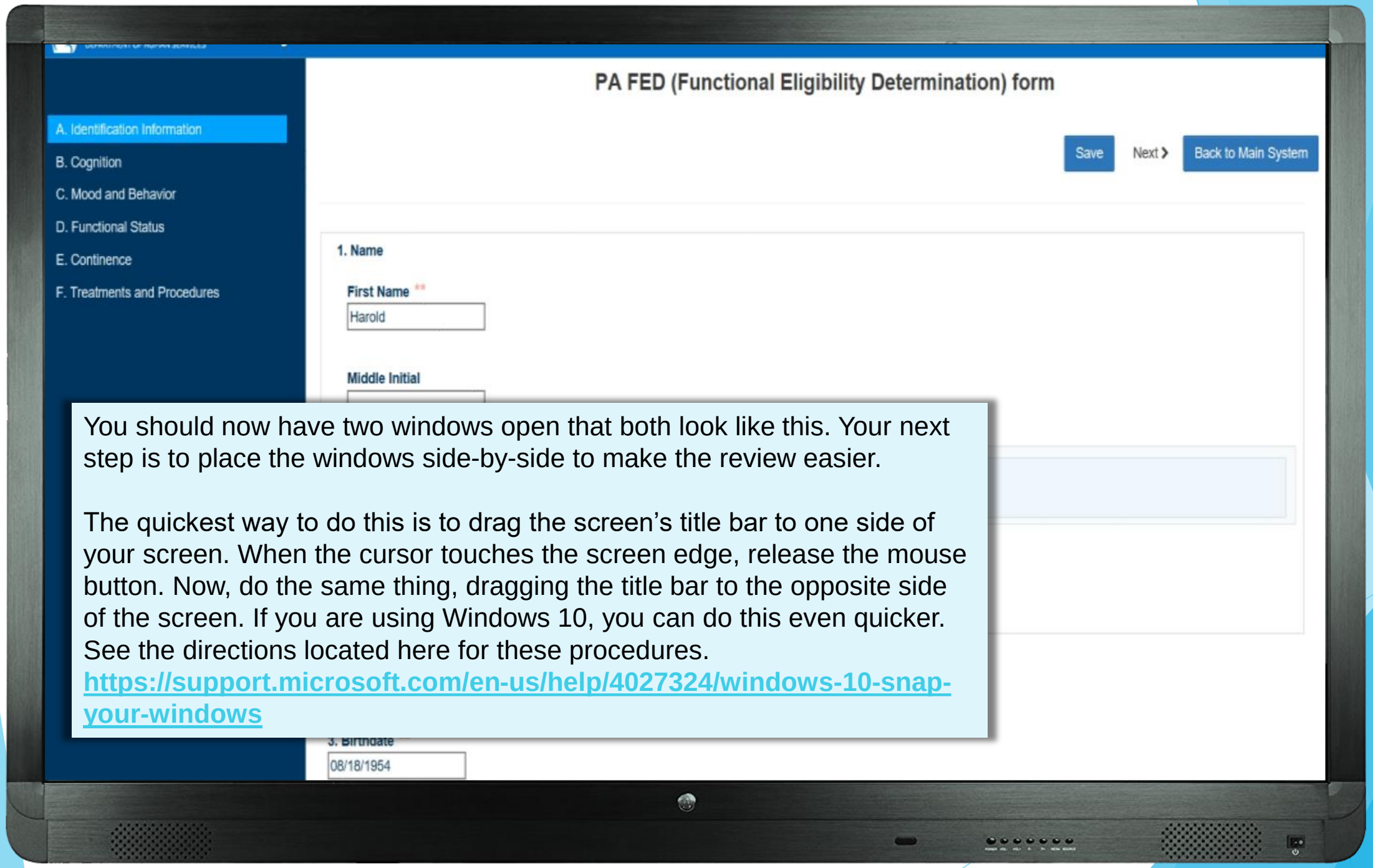

You should now have two windows open that both look like this. Your next step is to place the windows side-by-side to make the review easier.

The quickest way to do this is to drag the screen's title bar to one side of your screen. When the cursor touches the screen edge, release the mouse button. Now, do the same thing, dragging the title bar to the opposite side of the screen. If you are using Windows 10, you can do this even quicker. See the directions located here for these procedures. https://support.microsoft.com/en-us/help/4027324/windows-10-snap-your-windows

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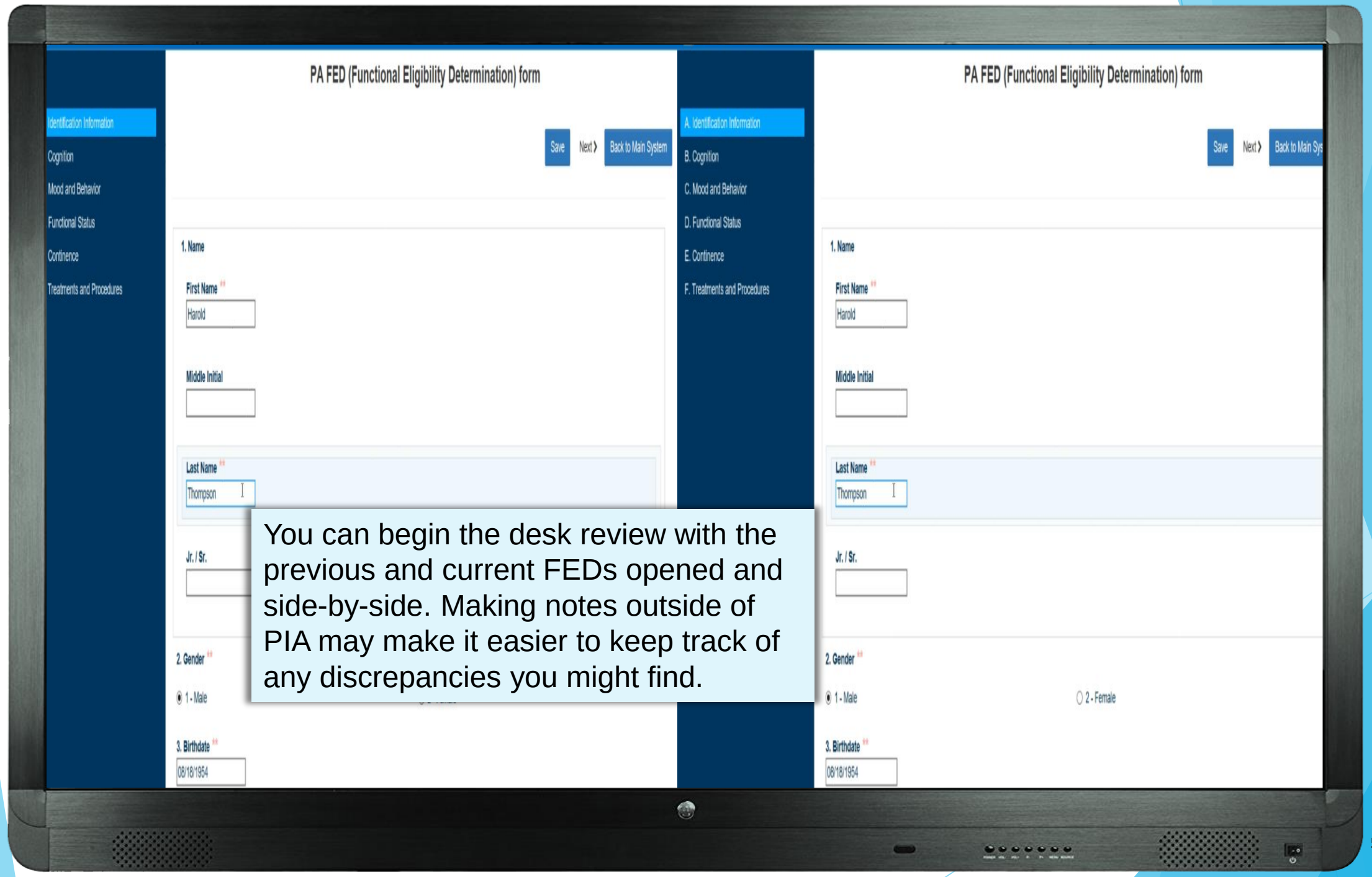

You can begin the desk review with the previous and current FEDs opened and side-by-side. Making notes outside of PIA may make it easier to keep track of any discrepancies you might find.

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What Will You Review?

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For all desk reviews:

- Look to see if the MCO assessment was completed on time. This means the MCO did an assessment on one or more occasions within the past 300-364 days.
  - If the MCO assessment was not completed on time, this should be noted in the Comments Section of the desk review (this is covered in later slides).
- Determine if there are any factual discrepancies in the personal information (correct name, date of birth, gender, etc.)
- Determine if the FED is complete. Are all the items in the original FED in the new assessment?

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For Priority Reviews NFCE to NFI

- When you have a case that has gone from **NFCE to NFI**, you complete all the items listed on the previous slide.
- Additionally, you must complete the **template** presented on the following several slides and attach it to the person's record.
- The template should not be used for non-priority reviews.

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Desk Review Template Description

- The template includes only the FED items used by the translator to calculate a final determination.
- It includes scoring values for a partial deficit & values for a full deficit.
- It provides a place to enter information comparing scores & a way to identify if any change in scores has changed the deficit level.

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Desk Review Template

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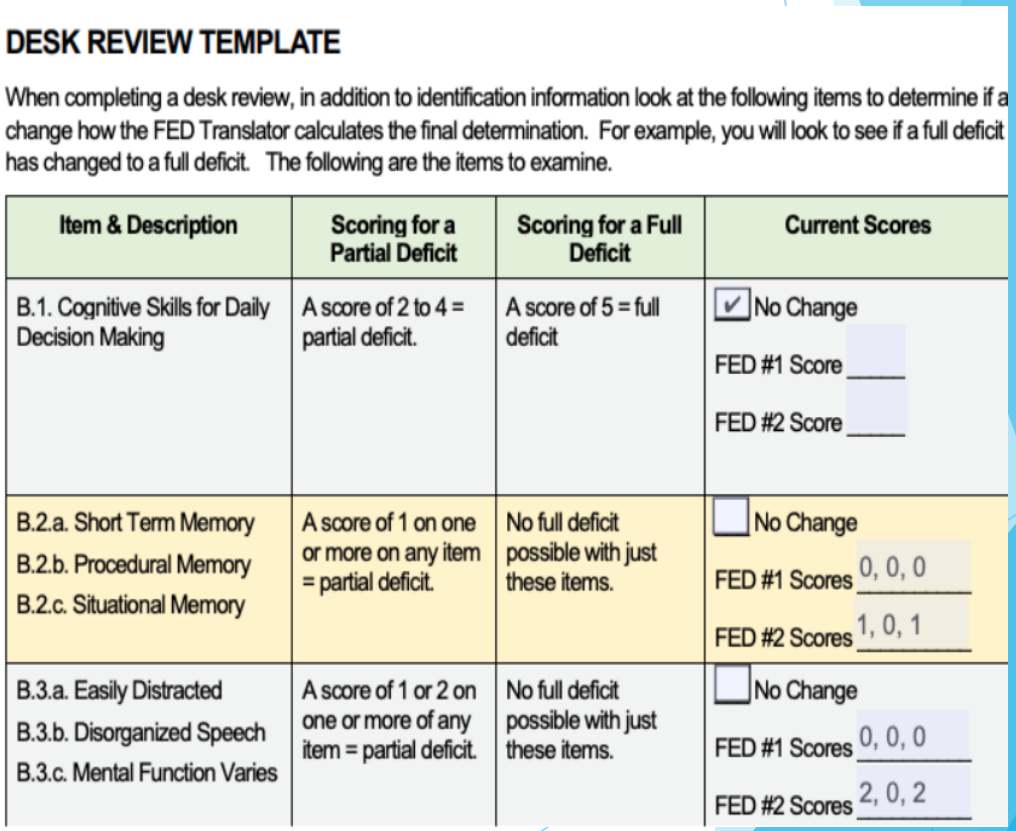
This form's most up-to-date fillable PDF copy can be found on the Aging Well PA Website.

When filling in the answers to the “Current Scores” column, you may write each score in that section with a comma in between, as shown in the picture.

If there is an “or,” provide an answer for both. For example, Section D should have 9 answers.



DESK REVIEW TEMPLATE

When completing a desk review, in addition to identification information look at the following items to determine if a change how the FED Translator calculates the final determination. For example, you will look to see if a full deficit has changed to a full deficit. The following are the items to examine.

Item & Description	Scoring for a Partial Deficit	Scoring for a Full Deficit	Current Scores
B.1. Cognitive Skills for Daily Decision Making	A score of 2 to 4 = partial deficit.	A score of 5 = full deficit	☑ No Change FED #1 Score ____ FED #2 Score ____
B.2.a. Short Term Memory B.2.b. Procedural Memory B.2.c. Situational Memory	A score of 1 on one or more on any item = partial deficit.	No full deficit possible with just these items.	☐ No Change FED #1 Scores 0, 0, 0 FED #2 Scores 1, 0, 1
B.3.a. Easily Distracted B.3.b. Disorganized Speech B.3.c. Mental Function Varies	A score of 1 or 2 on one or more of any item = partial deficit.	No full deficit possible with just these items.	☐ No Change FED #1 Scores 0, 0, 0 FED #2 Scores 2, 0, 2

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PRIORITY DESK REVIEW TEMPLATE

Name _____ PIA ID _____ Date _____

Completed by: _____

When completing a desk review, in addition to identification information look at the following items to determine if any scoring change was significant enough to change how the FED Translator calculates the final determination. For example, you will look to see if a full deficit has changed to a partial deficit or if a partial deficit has changed to a full deficit. The following are the items to examine.

Item & Description	Scoring for a Partial Deficit	Scoring for a Full Deficit	Current Scores	If there is a change in deficit classification, please indicate which it is.
B.1. Cognitive Skills for Daily Decision Making	A score of 2 to 4 = partial deficit.	A score of 5 = full deficit	☐ No Change FED #1 Score _____ FED #2 Score _____	☐ Change from partial to no deficit ☐ Change from partial to a full deficit ☐ Change from full deficit to a partial deficit ☐ Change from full deficit to no deficit ☐ Change from no deficit to a partial deficit ☐ Change from no deficit to a full deficit
B.2.a. Short Term Memory B.2.b. Procedural Memory B.2.c. Situational Memory	A score of 1 on one or more on any item = partial deficit.	No full deficit possible with just these items.	☐ No Change FED #1 Scores _____ FED #2 Scores _____	☐ Change from no deficit to a partial deficit ☐ Change from partial deficit to no deficit
B.3.a. Easily Distracted B.3.b. Disorganized Speech B.3.c. Mental Function Varies	A score of 1 or 2 on one or more of any item = partial deficit.	No full deficit possible with just these items.	☐ No Change FED #1 Scores _____ FED #2 Scores _____	☐ Change from no deficit to a partial deficit ☐ Change from partial deficit to no deficit
C.1.a. Wandering C.1.b. Verbal Abuse C.1.c. Physical Abuse C.1.d. Socially Inappropriate or Disruptive	A score of 2 or 3 on one or more of any item = partial deficit.	No full deficit possible with just these items.	☐ No Change FED #1 Scores _____ FED #2 Scores _____	☐ Change from no deficit to a partial deficit ☐ Change from partial deficit to no deficit

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Name _____ PIA ID _____ Date _____

Completed by: _____

If there is an “or,” provide a score for both. For Example: Section D should have 9 scores.

D.1.a. Bathing D.1.b. Personal Hygiene D.1.c. or D.1.d. Dressing D.1.e. or D.1.f. Walking/ Locomotion D.1.g. or D.1.h. Toilet use or transfer D.1.i. Eating	A score of 3 to 6 on any two items = partial deficit.	A score of 3 to 6 on any three or more items = full deficit.	___No Change FED #1 Scores _____ FED #2 Scores _____	___Change from partial to no deficit ___Change from partial to a full deficit ___Change from full deficit to a partial deficit ___Change from full deficit to no deficit ___Change from no deficit to a partial deficit ___Change from no deficit to a full deficit
D.2.a. Primary Mode of Locomotion	A score of 2 = partial deficit.	A score of 3 = full deficit.	___No Change FED #1 Score _____ FED #2 Score _____	___Change from partial to no deficit ___Change from partial to a full deficit ___Change from full deficit to a partial deficit ___Change from full deficit to no deficit ___Change from no deficit to a partial deficit ___Change from no deficit to a full deficit
D.3. Managing Medications	A score of 5 or 6 = partial deficit.	No full deficit is possible with this item.	___No Change FED #1 Score _____ FED #2 Score _____	___Change from no deficit to a partial deficit ___Change from partial deficit to no deficit
E.3. Bowel Continence	No a partial deficit possible.	A score of 4 or 5 = full deficit.	___No Change FED #1 Score _____ FED #2 Score _____	___Change from no deficit to a full deficit ___Change form full deficit to no deficit

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Using the Comments Section

- The Comments box is used to describe any discrepancy with the person's identification information and document if the MCO assessment was not completed on time.
- See the next slide for an example.

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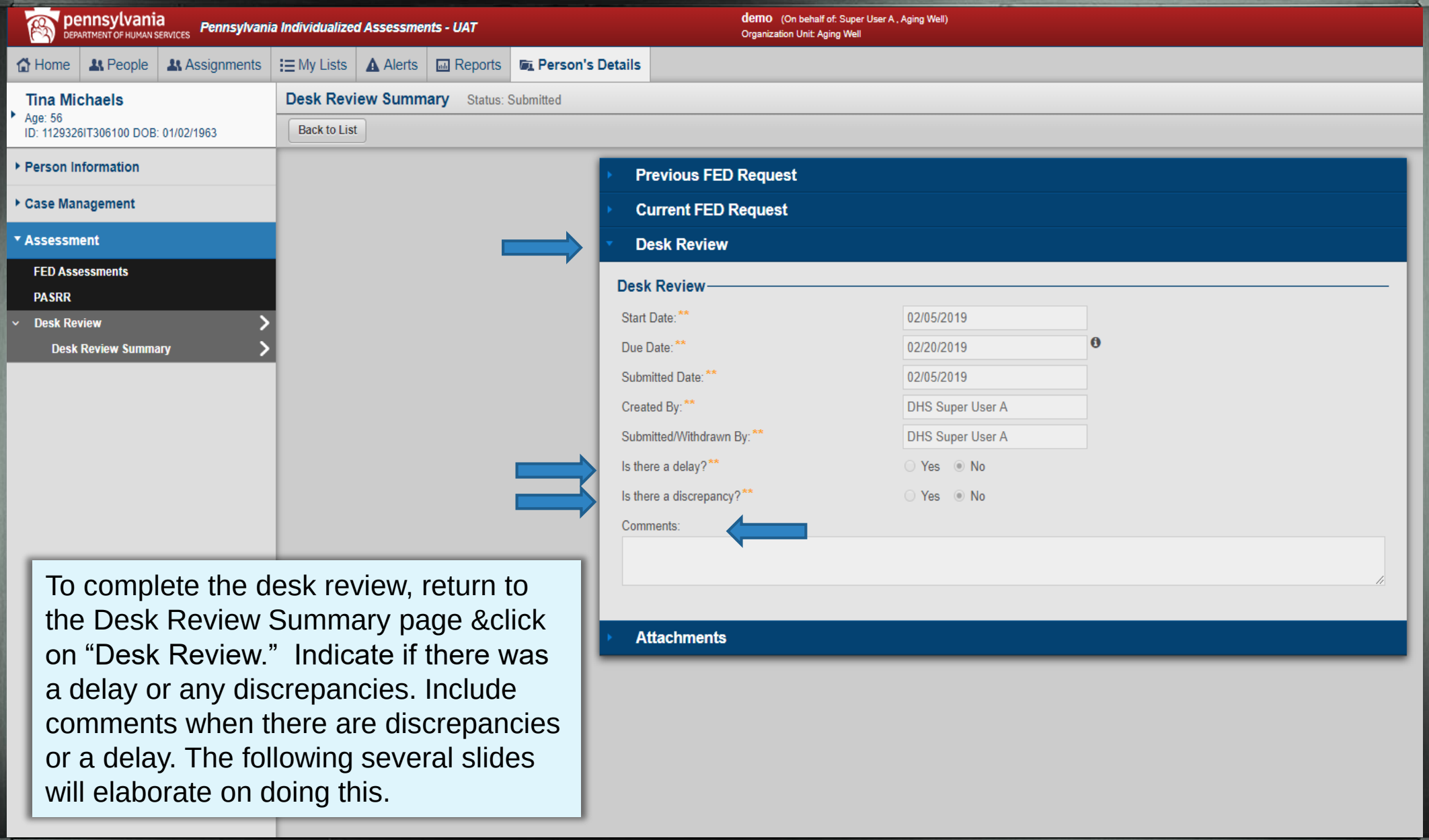

To complete the desk review, return to the Desk Review Summary page &click on “Desk Review.” Indicate if there was a delay or any discrepancies. Include comments when there are discrepancies or a delay. The following several slides will elaborate on doing this.

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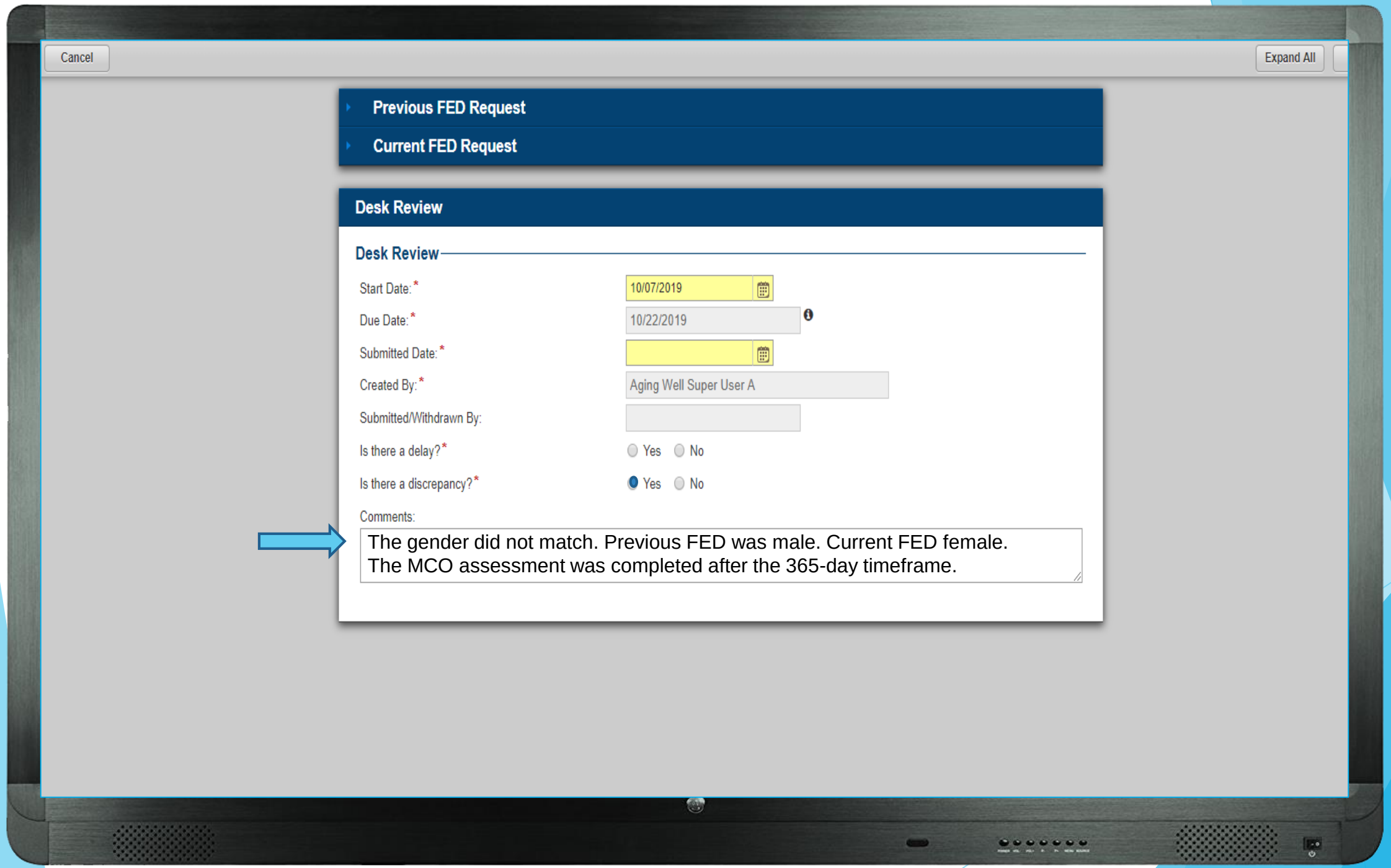

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Using the Comments Section

- For any NFCE to NFI situation, complete the comments section with the following:

  “See Desk Review Template attachment for details.”

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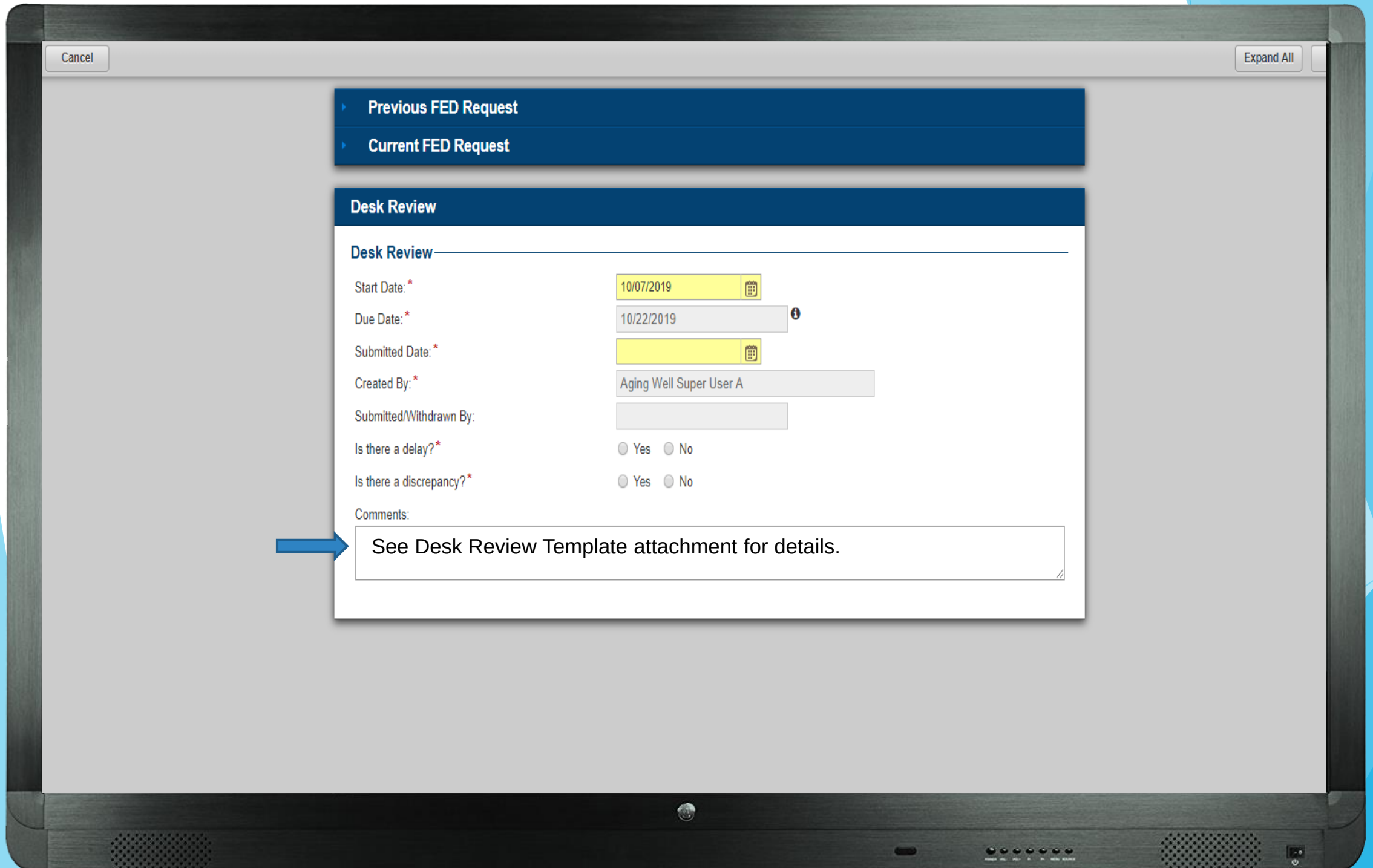

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How to Attach the Desk Review Template

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For NFCE to NFI priority cases, you must attach the Desk Review Template to the Desk Review “Attachments” section.

The following slides will outline the steps taken to attach your template.

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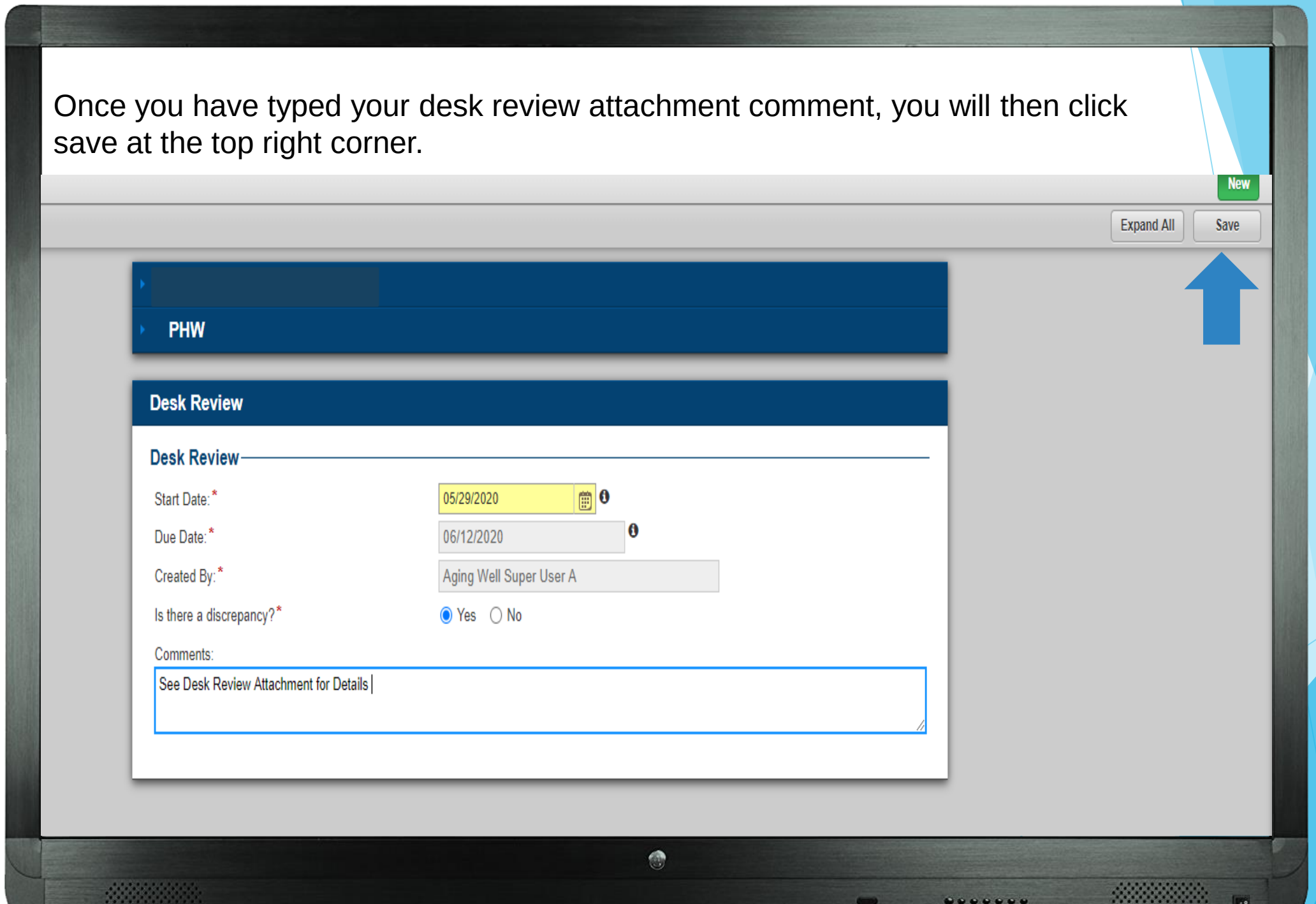
Once you have typed your desk review attachment comment, you will then click save at the top right corner.



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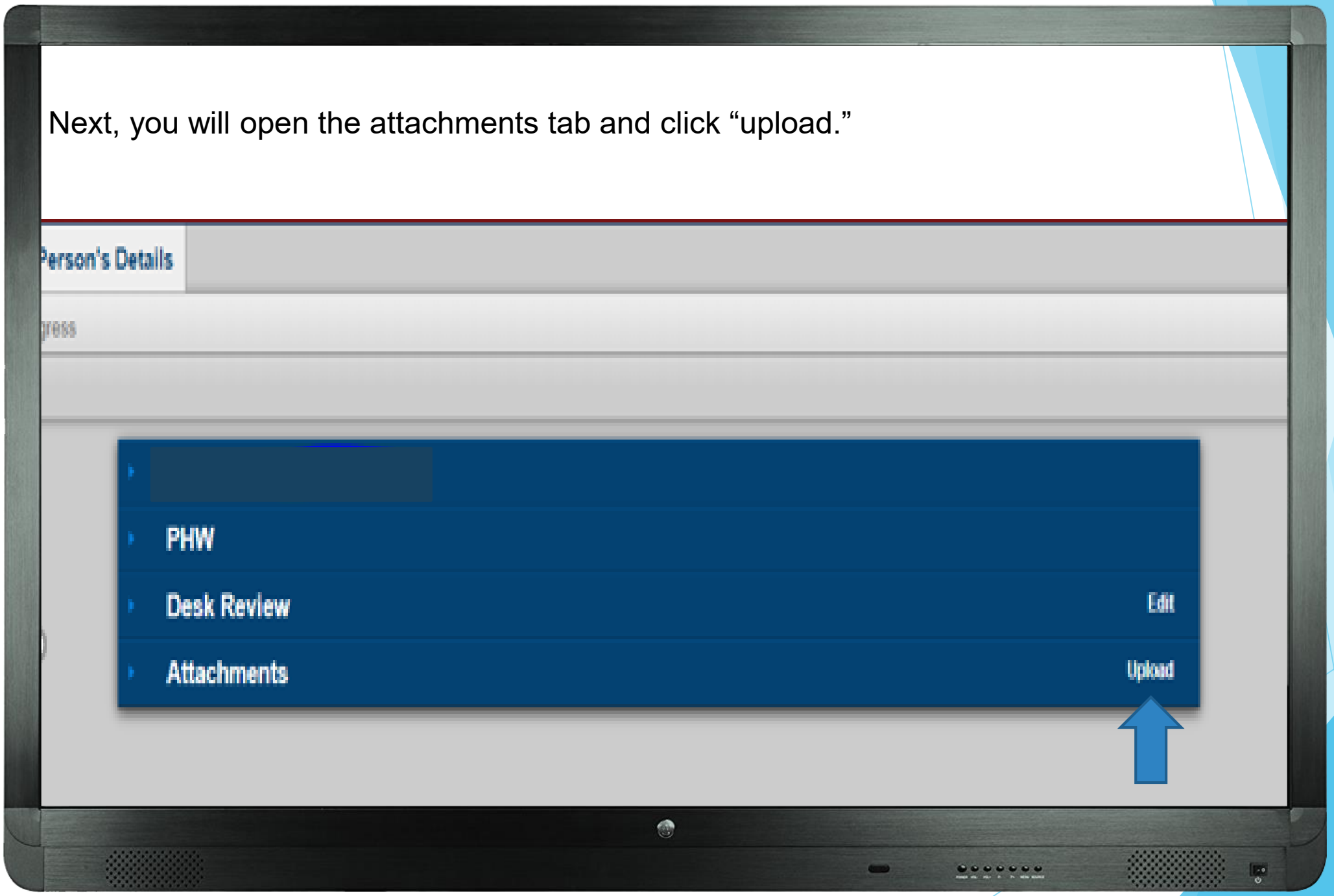
Next, you will open the attachments tab and click “upload.”



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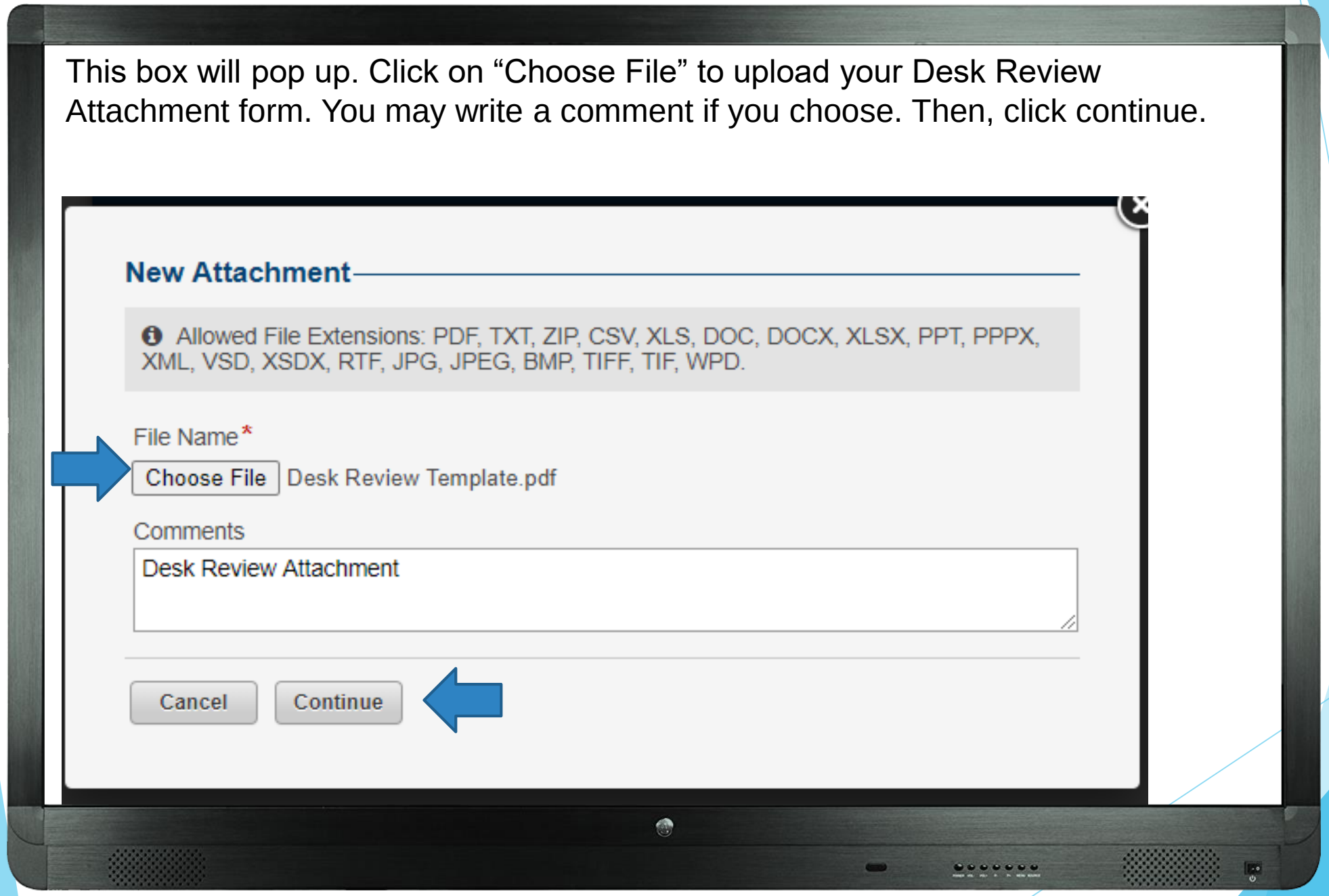
This box will pop up. Click on “Choose File” to upload your Desk Review Attachment form. You may write a comment if you choose. Then, click continue.



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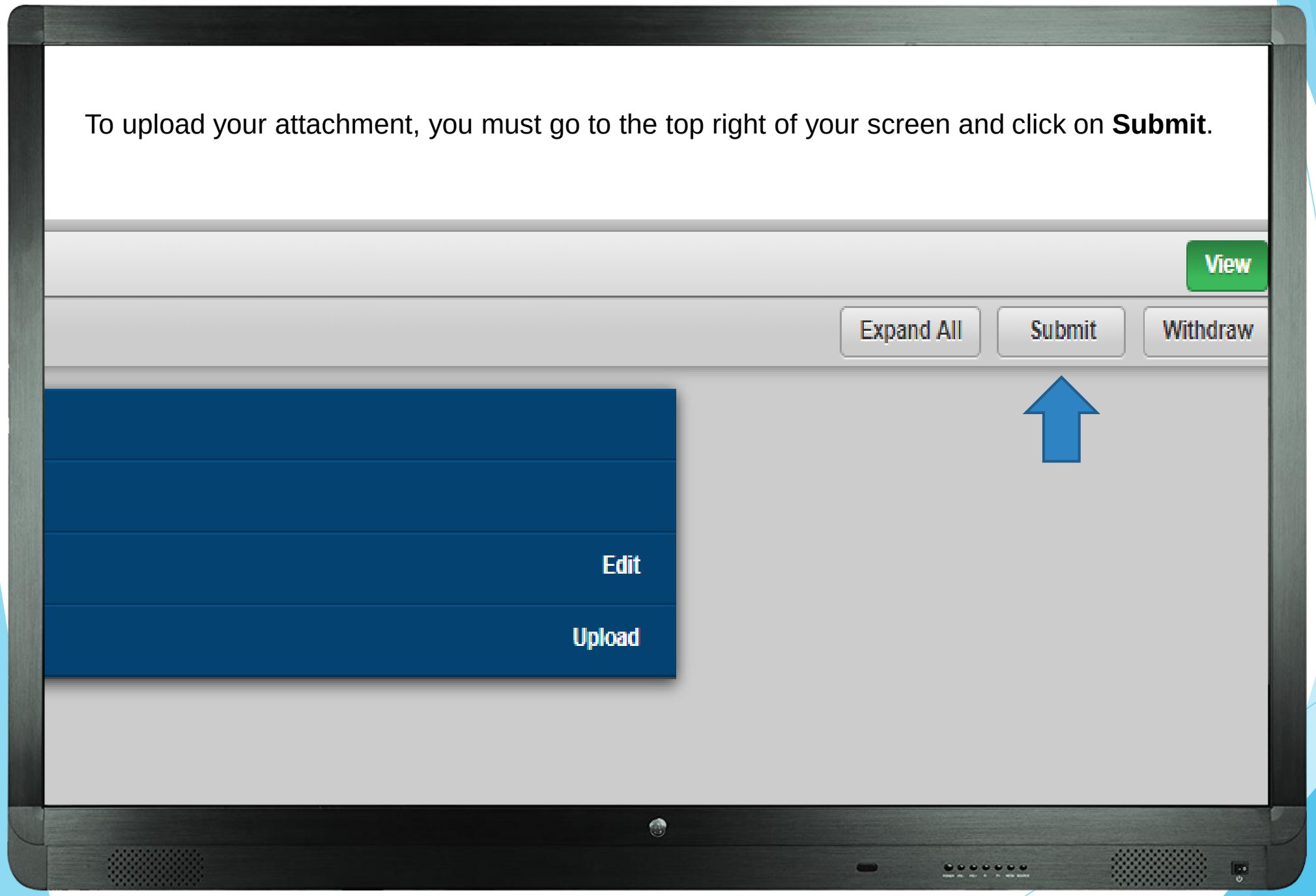
To upload your attachment, you must go to the top right of your screen and click on **Submit**.



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Alerting Aging Well

- All priority desk reviews should be brought to the immediate attention of Aging Well by sending an email with “Priority Desk Review” in the subject line to **aaarequests@agingwellpa.org**. You do not need to copy your QCSS on the email.
- These will be sent for a Medical Director Review.
- The email should include the participant’s initials and PIA ID number. Do not include any additional identifying information.

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Additional Information

- This presentation is available in PDF format & posted on the Aging Well website.

- If you have additional questions or need assistance, please get in touch with your Quality, Compliance & Support Specialist.

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